

An introduction to...

Fundraising



This course is a 5min read
with additional time required
for exercises

Getting a yes every time through great storytelling

Fundraising centres around the relationship between two core elements: philanthropy aligned with an organisation's values.

Success requires an act of philanthropy – an individual or an organisation making a gift to better another – in alignment with the receiving organisation's core values. As a fundraiser, it is your job to manage this relationship. This could mean anything from looking after your organisation's donations webpage through to meeting with benefactors directly.

Whilst on the surface, fundraising sounds straightforward, unexpected hurdles require you to troubleshoot and pivot as you go. Is your site collecting donations effectively? Is it a simple process to donate? Are potential gift-givers able to find your contact details? What's the story behind their potential gift? What's your organisation's story?

Fundraising keeps you on your toes. It requires you to navigate the delicate art of balancing relationships between benefactors and organisations, whilst identifying suitable solutions to make gift-giving happen.

What's your story?

Your job is a storyteller. It is your responsibility to tell the story of the organisation you represent and why it is important for others to support you. Equip yourself with key messages and examples so you can talk about the organisation for at least 5 minutes.

Fundraising facts

1. Not everyone gets it

Fundraising isn't just rattling buckets. It's about education. Your role is to help people better understand the value of your organisation. You need to educate externals – where you raise money from – and internals – who need to understand what fundraising is and how it works.

It can often be very expensive to bring your first donor onboard. Providing internal teams with information about fundraising helps gain their support longer term.

2. What's the message?

Why are you fundraising? What are the funds going towards? It might be for a capital project, or general fund raising to increase service offerings. Understand what the funds will be spent on and start to investigate the 'pie' and its breakdown.

3. The storyteller

In order to get people on board, you need to tell a good story about the organisation you represent. What is your story? Who are the key characters?

Spend some time exploring: who or what it is, who it serves, what its purpose is. Talk to others. Talk to previous donors. Gain as much information as you can. Then start forming some good stories to tell about the organisation, and rehearse them. You never know when you might need to use them!

4. Bottom of the list

Unless someone wants to proactively give to a pre-identified organisation, you are often at the bottom of people's list.

Try to make contact personal. Arrange to meet them if you can and listen to what they want to achieve. Paying for coffee can be a nice way to start the relationship. Small gestures matter.

5. Balancing act

Fundraising is a balancing act between being a storyteller, educator, and service provider. But it isn't a transactional experience. People like to be acknowledged, no matter the size of their gift. Sending a letter thanking them, after their donation, could be the difference between a one-off contribution and a life-long patron.

Top tip

Go to those who have already bought in

When trying to work out your organisation's purpose, start with those already in the organisation. Ask them why they got involved with the organisation and what it means to them.

Talk to your trustees – appointed individuals, often with influential networks. Ask for their advice. What do they like hearing about? Ask them if they had to raise £5k, who would they go to?

Look at what digital assets your organisation already has, for example a database of users or stakeholders. Any information about those who have already donated can provide you with valuable insights into who your key demographics may be. Are there any individuals or organisations who regularly donate? Do they share any commonalities?

A donor survey can be an excellent next step to find out what they would like to fund. However, be clear what you are going to do with this information upfront.



This activity takes 10min

Activity: Make a donation to your own organisation

It can be very easy to assume that because there is a page or a button, the system works. However, sometimes going through the experience yourself, as a donor rather than a representative, can raise issues around experience that would-be donors might not be able to tell you!

- Put yourself in the shoes of a potential donor. How would you go about making a donation?
- Work your way through the process. What do you notice? Was it simple? Were there unexpected complications? Did you notice yourself feeling frustrated at any point?

These experiences are useful to get in the habit of checking every so often. Remember, it could be the difference between keeping and losing donors. Make it easy for them to donate!

Further resources

[Trust funding](#)

[Association of Fundraising Consultants](#)

[Charities Aid Foundation](#)

[Institute of Fundraising](#)

[UK Government Charities Commission](#)